

State of Washington
Department of Retirement Systems

Rollover Authorization Into The Department of Retirement Systems

PO Box 9018
Olympia, WA 98507-9018
Toll Free: (800) 547-6657
Olympia area: (360) 664-7000

☐ PERS ☐ SERS ☐ TRS ☐ LEOFF ☐ WSPRS

Use this form to rollover funds to your DRS 401(a) account to purchase service credit or to purchase an additional TRS Plan 1 annuity from the following tax-deferred sources: Funds from other IRAs; distributions from any former employer's pension plan, or plans under IRC 401(a), 401(k), 403(a), 403(b) or 457. The Department of Retirement System (DRS) member must complete Sections A, B, C and D, and then forward the form to the financial institution holding the funds that will rollover to DRS. The financial institution completes Section E and returns the form with the funds to DRS.

Section A: Member Information

Member Name (Last, First, Middle)		Daytime Phone ()	Social Security Number
Address	City	State	Zip Code

Section B: Distribution Instructions from Existing Account

Rollover Amount (cannot exceed the bill amount): \$ _____	Fund Name/Account Number: _____
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Section C: Application of Funds Received by DRS (choose one)

- ☐ 1. Payment of Service Credit Purchase, DRS Bill # _____ Bill amount \$ _____
(If the rollover does not completely pay the bill, the balance must be received within 30 days or DRS will return the rollover to the originator.)
- ☐ 2. Purchase of Additional TRS Plan 1 Annuity in the amount of \$ _____

Section D: Signature of Member Applicant

I authorize the financial institution listed in Section E to rollover the tax-deferred assets from my account(s) as stated in Section B, up to the amount stated in Section C to DRS, and make a check payable to the "Department of Retirement Systems for the benefit of _____,"
Print your name
and mail to: DRS, PO Box 9018, Olympia, WA 98507-9018.

Signature of Member Applicant _____ Date _____

Section E: Surrendering Financial Institution Information

Trustee, Custodian, Company Name		Telephone Number ()	
Address	City	State	Zip Code
Contact Name	Signature		

Section F: Acceptance

The Washington State Department of Retirement Systems certifies that the individual identified in Section A is a participating member of a Washington State Retirement Plan under IRC 401(a), and is authorized to rollover tax-deferred funds to his or her retirement plan up to the amount identified in Section C. Please remit a check payable to the Department of Retirement Systems and mail with this form to: PO Box 9018, Olympia WA 98507-9018.

Internal Revenue Code Sections 6041 (A), and 6109 authorize the Department of Retirement Systems (DRS) to solicit your Social Security Number.

- The disclosure of your Social Security Number to DRS is mandatory.
- DRS will use your Social Security Number to ensure that any amounts disbursed under your account are properly reported to the Internal Revenue Service and as a reference number for tracking all data with regard to your retirement account.
- DRS will not disclose your Social Security Number to any party unless required by law.

IMPORTANT INFORMATION

The Department of Retirement Systems (DRS) strongly recommends that you consult a tax advisor before completing this transaction.

- Any monies paid from your financial institution that are more than the bill amount will be refunded to your financial institution. This may have future tax consequences if the monies are not accepted for redeposit.
- Rollovers and transfers into a state retirement system cannot be made from a Roth IRA.
- This rollover or transfer is a choice initiated by you. DRS does not certify that the rollover is appropriate. DRS is not responsible for any tax consequences resulting from your choice. Contact the IRS with questions concerning your rollover or transfer decision at 1-800-829-1040.
- Please verify the current amount of your bill by calling DRS before requesting a rollover from your financial institution. Call DRS toll-free at (800) 547-6657. Those in the Olympia area may call (360) 664-7000.